DOCUMENT RESUME

ED 210 020 IR 009 825

AUTHOR	Manthorne, Jane, Ed.
TITLE	Evolution of a Catalogue: From Folio tc Fiche. Report on the Research Library Catalogue Project.
INSTITUTION	Boston Public Library, Mass.
SPONS AGENCY	Office of Libraries and Learning Resources (ED), Washington, D.C.
PUB DATE	81
NOTE	31p.
EDRS PRICE	MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	*Cataloging; *Change Strategies; Federal Aid; Library Automation; *Library Catalogs; Library Collections; *Microfiche; Public Libraries; *Research Libraries
IDENTIFIERS	*Boston Public Library MA

ABSTRACT

The Editing, Photoduplicating, and Distributing of the Research Library Catalogue of Boston Public Library Project, which is described in this report, was supported by grants awarded under the Strengthening Research Library Resources Program, Title II-C of the Higher Education Act of 1965 administered by the Office of Libraries and Learning Resources. Divided intc two parts, the report first traces the history of the library from a gift cf 50 volumes from the City of Paris to the City of Boston in 1843, to 3,000,000 volumes in 1979 when this rehabilitation project was undertaken. As the collection and catalog grew, the history of the Boston Public Library paralleled the evolution of modern cataloging processes, and the second part of tne report describes the activities of the first phase of the project, as catalog cards were translated into microfiche in order to preserve millions of deteriorating bibliographic records, expand access to the research collections of the Boston Public Library, and offer insights to other research libraries planning to integrate newer styles of cataloging into existing bibliographic files. The major phases of the project are briefly reviewed and presented as a chart. (RAA)

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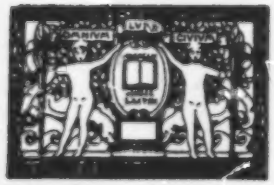
Evolution of a Catalogue

From Folio to Fiche

Report on the Research Library Catalogue Project



Boston Public Library · 1981

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The Research Library Catalogue Project and this descriptive booklet were funded in part by grants under Title II-C of the Higher Education Act of 1965: Strengthening Research Library Resources Program

Edited by Jane Manthorne

Designed by Richard Zonghi

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Part I

"The Crowning Glory": Library Beginnings

On October 1, 1978, a project to rehabilitate the Research Library Catalogue of the Boston Public Library was launched. Titled "Editing, Photoduplicating, and Distributing of the Research Library Catalogue of Boston Public Library," the project was supported by grants awarded under the Strengthening Research Library Resources Program, Title II-C of the Higher Education Act of 1965, administered by the Office of Libraries and Learning Resources. The project, like the catalogue it restored and enhanced, was more than 125 years in the making.

The Boston Public Library collection began in 1843 with a gift of some 50 volumes from the City of Paris to the City of Boston, a gift accomplished through the efforts of Alexandre Vattemare, a French ventriloquist with a literary bent. Back and forth across the Atlantic went Vattemare, pushing for an exchange of books between cities. The gentleman soon became the unlikely instrument in phase one in the creation of the first large library established as a municipal institution.

The first books from France were rapidly augmented by collections and moneys from other benefactors. From Edward Everett, scholar-statesman and first President of the Board of Trustees, came his valuable library of State papers and other works in 1851. With Everett's collection of approximately one thousand books came what was to constitute the Library's first catalogue, Everett's own careful list of his donations.

By the time the Boston Public Library first opened its doors to the public on March 20, 1854, on the ground floor of the Adams Schoolhouse on Mason Street, the collection numbered more than 12,000 volumes. In the same year the Library published its first printed catalogue. The preface describes it as "A condensed index of the contents of the Public Library, giving the title of each book only once and having no object but to render all the books useful."

The catalogues on hand in the first year of the first library included an accession book with records of cost and condition of each volume received; a shelf-list indicating the arrangement of books on shelves; an official or officer's card catalogue open "to persons who wish to make careful investigation of particular subjects"; and the printed alphabetical catalogue which was placed on tables in the reading room. This volume was interleaved with blank pages to receive daily entries of the titles of books added to the Library.

So it was, as early as 1854, through burgeoning book collections and beginning lists and catalogues, the Boston Public Library was auspiciously launched. It would surely become, in the words of the remarkable Trustees' Report of 1852, "the crowning glory of our system of City Schools." A later report (1920) moved to further panegyric: The Library "stands as a sort of lay cathedral, built up by successive generations, and expressive of all that is best in the civic and secular life of New England."

A Mighty Book Collection and How it Grew... and Grew...and Grew

In the next hundred years or so, the collection building and catalogue development shared equal priority in the Library's attention to growth and policy. On the growth side, the book collection which numbered more than 12,000 in 1854 was doubled in 1856, more than doubled again in 1858. By this time the Library occupied its new Boylston Street building, opened on January 1, 1858. By 1868 the book collection had doubled once more, still again in 1874. This extraordinary growth continued throughout the latter half of the nineteenth century and ultimately led to the construction of the landmark building in Copley Square,

designed by Charles Follen McKim. The research collections of the Library have been housed in the McKim building since its opening in 1895. By the time the Title II-C rehabilitation project was undertaken in 1979 these collections exceeded 3,000,000 volumes.

Throughout the years of growth the Research Library of the Boston Public Library has been developed and organized with particular attention to both subject specialization and broad scope, with rare local collections joined by American trade and university publications as well as international acquisitions. Collection development on a scholarly, international level is pursued today as it was in 1852, after the inspired beginnings by such gentlemen as Vattemare and Everett.

In 1852 Joshua Bates, a self-educated London merchant born in Massachusetts, made library history with his generous gift of fifty thousand dollars to the Boston Public Library. Moreover, in 1855 he offered to purchase for the new library "as large a collection of books in as many departments of human knowledge as possible." As a result of Bates' offer, George Ticknor, a Harvard professor and early Trustee of the Library, departed on a buying trip to the great book marts of Europe—to London, Paris, Brussels, Berlin, Leipzig, Vienna, and Florence. From this beginning the pattern of book acquisition was shaped in depth and range and major languages. It was not surprising that the main reading room of the Research Library continues to be known as Bates Hall in honor of the Library's early benefactor.

In the years since Bates' benefactions the Boston Public Library has achieved, through gift and purchase, impressive dimensions in its resources. Acquisitions include the library of President John Adams, an 18th-century gathering of law and government, political and constitutional history, classics, religion, and agriculture; the Prince Collection, containing such rarities as the *Bay Psalm Book* and John Eliot's Indian *Bible*; the Anti-Slavery Manuscript Collection (popularly referred to as the Garrison Papers), consisting of the letters and documents of William Lloyd Garrison and his abolitionist associates; the Boston Latin School Collection of some 5,000 items related to the history of the oldest educational institution in continuous existence in this country; the library of the American navigator, Nathaniel Bowditch; the Franco-American Collection, containing rare parish histories of French settlements in Vermont, Louisiana, Maine, and New York.

From a remarkable roster of book collectors have come 20th-century additions to the special collections of the Boston Public Library—from cardinals and comedians and composers, from politicians and poets. There is the Joan of Arc Collection, a gift from John Cardinal Wright; the Fred Allen papers and memorabilia; the Serge Koussevitzky collection; the David McCord Library. On and on goes the list of significant resources which commands the attention of researchers on a global scale.

Testament to the depth and ranginess of the Research Library comes daily in the interlibrary loan requests, the correspondence, and the in-person study by scholars from throughout the United States and abroad. A recent sampling of research supported by the Library's resources included such subjects as underwater acoustics, Renaissance Spanish music, women in English church history, the Hudibrastic tradition in America, the role of George Washington as farmer, and Aztec games. In 1980 alone requests for information and material came from some 42 states and 16 nations and from such institutions as the Library of Congress, the Lenin State Library, the National Library of Australia, and beyond.

This, then, is the Research Library represented in the 7,500,000 cards of the Research Library Catalogue.

The goal of the project, begun in 1978, was of herculean proportions: to edit, reproduce, and distribute this catalogue in order to make the research collections of the Boston Public Library bibliographically accessible to a global range of scholars and researchers and to promote the sharing of carefully developed resources.

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A Catalogue Is...

The Research Library Catalogue Project of 1978 demonstrated a pride and faith in the role of the catalogue that has emerged repeatedly in annual reports. In 1857: "The system of cataloguing the books in the Public Library is as perfect as that of any other in the country." And in 1861: "Whatever skill and industry can do in the preparation of catalogues, we are proud to say has either been already attained, or may be reasonably anticipated." In many annual reports the absolute necessity of the catalogue, the indispensability has been expressed in the exalted imagery of myth and metaphor:

> "A large library without good catalogues has sometimes been compared to a Polyphemus without an eye." (1858)
>
> "A library without a catalogue... is a labyrinth without a clue." (1861)
>
> "Without a catalogue, libraries would relate a melancholy story of baffled inquiry, and of long and arduous labor lost." (1861)
>
> "But books without catalogues... are little better than a dead mass growing more and more unmanageable." (1863)
>
> "A catalogue for a library is what an index is to a book, and it is more indispensable."
>
> "The catalogues of the Library are the eyes through which the people who use it can see what there is in it, and find what they want." (1908)
>
> "The Public Card Catalog [is the]master key to the Library's reference and research collections." (1961)

Book versus Card Catalogue: An Historic Debate

Down the years Library administrators never doubted the importance of the catalogue. Probably the most graphic tribute came from Superintendent Jewett in 1858: "A library has been defined to be 'a collection of Books'; but such a definition is as inadequate as to say that an army is a collection of men. To constitute an army the men must be organized for warlike operations. So, to form a library, books and titles must be rightly ordered for their appropriate use."

Although the importance of the catalogue remained unchallenged, the relative virtues of card versus printed book catalogues were frequently debated. As early as 1858 a catalogue of the collection in the Lower Hall of the Boylston Street building was printed "to meet a want for which no sufficient provision has heretofore been made." Titled *Index to the Catalogue*, the volume contained the titles of about 15,000 popular, circulating books. Eight annual supplements were published at intervals up to 1865.

By 1861 an *Index to the Upper Hall* was published as a guide to the 74,000 scholarly volumes in the Boston Public Library at the time. This marked the first printed book catalogue of the research collection. A group of citizens, charged with evaluating library collections and services (the Examining Committee), was moved to remark in 1863: "It has been received and acknowledged in other parts of the United States and Europe, by persons eminently fitted to pronounce judgment on its merits, as a contribution to the facilities for acquiring knowledge through the use of large libraries, such as has not been afforded elsewhere." A supplement to the Index was published in 1866 and, almost immediately, plans were set in motion for the next volume.

During these early years of the Library, as variant forms of accession books, finding lists, catalogues, and shelf lists emerged, an impediment to printed

volumes soon became evident. The obstacle was a positive one, namely the rapid expansion of the collections. Soon after assuming the office of Superintendent, Justin Winsor saw clearly that this great increase was "almost a portent of future unavailing efforts to keep up in print with the growth of the Library." It is not surprising that a public card catalogue was adopted within a decade of the first book catalogue because—by 1871—readers were obliged to examine close to thirty volumes of catalogues and bulletins in the Upper and Lower Halls of the Boylston Street building, an intolerable state of affairs.

The projected third volume of the Upper Hall collection never went to press. Instead, in 1872 it was announced that "An important change has taken place in the management of the catalogue." Following the examples of the British Museum, the Bodleian Library, the Royal Library of Berlin, and "other of the

chief bibliographical authorities of the continent," it was decided not to print a new volume of the book catalogue. Instead, a public card catalogue was begun. This new catalogue, maintained first in manuscript but wholly on printed cards by 1904, was described as "admitting of indefinite expansion, the cards being protected from removal or displacement by superincumbent wires." But the debate concerning the relative merits of book versus card catalogues continued and can be traced in the annual reports for a score of years.

After less than a decade of development the problems inherent in maintaining a catalogue on cards had become apparent. Its fragility and size were cause for concern along with its reductive nature: "The serious objection to this immense collection of cards is, after all, not merely its size, but the fact that all sense of proportion and relative importance is lost." Defenders of the card format countered: "No catalogue but a card catalogue has yet been invented which can conveniently be kept up to time. That such a catalogue should be worn out by those who use it would be but a proof of its utility."

The essential dilemma was set forth in 1880: "Practically it is a choice between a bulky and cumbrous card catalogue on the dictionary system in one alphabet, keeping pace with daily accessions, and printed catalogues in several alphabets, which do not include the additions to the Library for a term of years." The ultimate decision fell to James L. Whitney, Chief Cataloguer at the turn of the century. His thinking is spelled out in eleven detailed pages in the annual report of 1898–99, as "Considerations as to a Printed Catalogue in Book Form." Whitney took into account all the factors involved in maintaining a book catalogue—personnel, time, use, size and growth of the collections represented, supplements, costs, methods of printing, sales potential, alternatives, and the experiences of other major research libraries. His conclusion regarding the feasability of updating and continuing the early book catalogues amounted to a reaffirmation of the decision of 1872: "I think that such an undertaking would be unwise. The decision of twenty-six years ago was based on reasons which have gathered strength with the passing of time."

Whitney's judgment held for the next 75 years and was reflected in the practices of most libraries in the United States and other countries. Although the Library published catalogues of special collections in book form, it was not until 1975 that the Boston Public Library again produced a book catalogue for a major collection. In that year the Library published a 64-volume catalogue, made by photographing approximately 700,000 cards representing the 300,000 circulating titles within the General Library section of the Central Library at Copley Square. Rehabilitation of the Research Library Catalogue after more than 75 years mandated a different approach than the handling of the General Library Catalog.

Evolution and Innovation

In the years leading up to the Research Library Catalogue Project the Boston Public Library emerged frequently as innovator. To Charles C. Jewett was attributed the development of "a distinct novelty," the dictionary catalogue. Jewett, who left his post as librarian at the Smithsonian Institution to become the first Superintendent of the Boston Public Library in 1858, described his innovation: "If these names of persons, books, topics and classes be arranged in one alphabet, it would seem that every person, whether conversant or not with methods of learned research and bibliographical systems, will have every possible facility for ascertaining what the library possesses, and where each possession is located."

Six years after publication of the first book catalogue of the Upper Hall collection on Boylston Street, the Library saw the need for an interim list and in 1867 commenced printing a *Bulletin* so that new accessions might be "earlier and oftener made known to the multitudes interested in them." Designed for "annunciation at short intervals," the *Bulletin* was issued quarterly during its first 28 years and then monthly beginning in 1896.

In still another innovation the Boston Public Library recognized early in its history the importance of giving readers a sense of the contents of a book. To this end the Library introduced what probably were the first popular-level annotated reading lists. Justin Winsor, the Library's second Superintendent who later went across the river to Harvard designed several such lists, e.g. "Guide to Historical Fiction" (1871). He used them "to direct the ductile perceptions of the less learned among readers" and "to render the ordinary reader more able to choose to his liking when an indistinguishable mass of equivalent titles perplexed him."

The Boston Public Library was quick to issue printed catalogues of its special collections. Some early examples include a list of French, German, and Italian books (1869), the first catalogue of the Ticknor Collection relating to Spanish and Portuguese literature (1879), and the several parts of the catalogue of the Barton Collection devoted to works by and about Shakespeare (1879–1888).

The Library was pioneer as well in the printing of branch library catalogues. By 1883 catalogues were in print for the collections in Brighton, Charlestown, Dorchester, East Boston, Jamaica Plain, Roxbury, South Boston, and the South End. Each catalogue was available to library patrons for prices ranging from 20¢ to 50¢. And in 1902 came the announcement that "The event of the year has been the issue of the consolidated Branch Finding List." This union list can be seen as a precursor of the newest Boston Public Library catalogue.

A remarkably useful tool appeared in 1867 as "an adjunct of the catalogue." At that time Mr. Jewett developed the so-called Indicator. Working with a cabinet maker, Mr. Jewett designed a mechanical frame which could reveal at a glance whether a given book was in or out. With numbered strips of wood representing shelves, and pins representing books by call number, the Indicator showed the books in circulation by reversing the position of the pins for books out on loan. Jewett's invention is one more example of how the Library's concern for interpreting and servicing its collections led to the development of tools as well as lists and catalogues.

The Advent of Automation

Titles added to the circulating collections of the General Library and the branches since 1975 have been recorded in a new catalogue produced on computer output microfilm (COM). The COM Catalog, as it is generally known, presents records in a divided form; there are separate sections for approaching an item by author, title, or subject. These catalogue records are stored as machine readable data according to nationally accepted specifications, and the entire file is continuously cumulated. The COM Catalog, like the Library's earliest book catalogues, is reissued at intervals.

The Boston Public Library's shift in the 1970's to computer-based cataloguing reflects its traditional concern for rendering its collections as accessible as possible by adopting newer technologies with library applications. Since 1975 the Library has used a system developed by Inforonics, Inc. to support many of its own cataloguing needs and to supply cataloguing for 25 affiliated libraries in the Eastern Region, a state-

supported network of public libraries in the eastern part of Massachusetts. In the spring of 1980 the Library acquired its own computer, a development of major consequence in the future control of all Boston Public Library collections. Despite the successful application of automated techniques to current bibliographic records, improving the Research Library Catalogue after more than 100 years of card production required a different approach.

Catalogue Revision: An Unending Process

From its inception the Research Library Catalogue has been described as undergoing continuing revision and rehabilitation. The annual report of 1887 indicates that revision at this time included recataloguing, "bringing to notice the component papers and articles" in many volumes in sets through analytic entries, and copying catalogue cards still in manuscript. In 1892 we read, "The revision and improvement of former work, the replacing of cards worn or soiled in constant handling, in the Bates Hall cases, has been continued."

The magnitude of the Title II-C rehabilitation project has been matched, in terms of human effort, only once in the Boston Public Library's catalogue history. Thanks to legislation in the 1930's authorizing federal funding for the unemployed during the Depression years—what was ultimately called the Works Progress Administration or WPA—the Library was able to employ between 700 and 1200 additional workers.

The WPA workers painted walls and cleaned books. But, most important, they were mobilized to transform and modernize the shelf lists and card catalogues of the Research Library and the circulating collections. In the annual reports commencing in 1934, the improvements made possible under WPA are described as changing the cards in the several card catalogues of the Central Library to uniform size; changing the shelf lists of the Central Library from their old handwritten folio volumes to a modern arrangement on uniform size cards; preparing to initiate a reclassification of the scholarly book collections of the Central Library on a modern classification scheme such as that of the Library of Congress, then embarking on the reclassification itself; initiating, for the branch libraries and other units of the Circulation Division, a uniform cataloguing and classification of books. "For instance," said the annual report of 1937, "there have been up to the present time four different classification arrangements and six different sizes of catalog cards in use."

The WPA workers in the period extending from 1935 to 1943 were so numerous that they occupied a large building in the South End of Boston beyond the Back Bay Railroad Station. It is interesting to note that at times when the regular staff of the Boston Public Library numbered fewer than 600, the WPA contingent equalled twice that number! The 1937 annual report of the Library noted that, "Of all the relief undertakings of the Federal Government, this has been the largest single library project throughout the country. . . . Apart from its central object of relief, the project has made an inestimable contribution to the immediate and future value of the Library as a workshop for scholarship."

View of the Cards Themselves

As staff members embarked on the Research Library Catalogue Project on October 1, 1978, they faced 6,648 trays containing more than seven million catalogue cards. They faced, as well, challenges or problems derived from several factors: disparities arising from more than 125 years of variant styles and standards of descriptive cataloguing; incongruities stemming from different subject headings and classification systems still unreconciled by the end of the WPA project; a

montage of changing type fonts and non-Roman scripts reflecting the historical depth and international scope of the collections; color-coded cards—yellow for the temporary cataloguing of Depression days, red indicating cards out for correction, blue for information and references; and finally the deteriorating condition of the cards themselves. Annual reports down the years have spoken of "grubby," "ragged," and "soiled" cards—the well-worn, the torn, and those "annotated" *gratis* by patrons. All these conditions testified to the heavy use of the catalogue by generations of researchers, by thousands upon thousands of searching fingers.

This, then, was the behemoth which the project staff faced in 1978. More than a tool, the catalogue resembled an organism, subject down the years to growth, change, and movement. Its rapid growth, concomitant with that of the collections, has already been indicated. Its entries span more than seven descriptive cataloguing codes and reflect two major, as well as several minor, classification schemes. And, despite modernizing efforts in WPA days, the catalogue continued to exhibit in places the morality and usage, the religiosity and circumlocution of the Victorian era. The Research Library Catalogue of 1978 still retained many period terms and euphemisms:

> Manly exercises. *See* Gymnastics
>
> Insane drunkards. *See* Inebriates
>
> Evil. *See also* Good
>
> Hell. *See also* Future life
>
> Depravity, Total. *See* Original sin
>
> Coffins. *See also* Boxes
>
> Libraries. Spoliations. *See also* Books. Thefts.

Not only did styles of description and subject analysis undergo change but, likewise, the physical cards

themselves. In 1888, when plans were afoot for the McKim building, it was proposed that "some architect or other skilled person be consulted with a view

to securing, if possible, some other arrangement of the drawers." When the new building opened in 1895, the new catalogue was extolled over the "large, cumbrous, heavy drawers" which had to "engross some 50,000 cards in searching for perhaps but one." To secure cards for the move to Copley Square each drawer was fitted with two brass rods. It thus became necessary to punch two holes in each of the 900,000 cards comprising the catalogue at the time! The 1895 report notes with pride that "This task was accomplished in less than twelve days without the misplacement of a card."

Though the new catalogue trays were more convenient for users, the cards themselves remained quite large. They measured 5½ x 6¾ inches, a little more than twice the size of the cards now in use. In the annual report of 1899 it was recommended that these cards be trimmed and that a single rod be substituted for the double rod. Anticipating more recent concern for shared cataloguing and interlibrary cooperation, the report stated that "This Library can never arrange an interchange of cards with other libraries which might be desirable and economical, so long as it clings to the double rod."

From Library Hand to Linotype

Techniques of card production and reproduction varied over the years, and, not surprisingly, legibility was to command much attention during the Title II-C project. Probably the least readable catalogue entries occurred in the first card catalogue on Boylston Street. At the time this catalogue was created in 1871, the printed indexes and finding lists that had succeeded the earliest handwritten, paper "slip catalogue," were cut up and pasted on cards. These fine print entries were not easy to read and were gradually replaced with more legible cards.

Improvement began in 1875 when the Library undertook the printing of catalogue cards, at first in heliotypic facsimile of manuscript. The 1876 annual report describes how titles were written, twenty to a sheet, with specially prepared ink and then transferred by a new process onto either a lithographer's stone or a gelatine plate, from which impressions were made with ordinary printer's ink upon sheets of Bristol board. These sheets were subsequently cut by machine into cards ready for filing. Initially the Library furnished the stock, and the printer—who was paid by the card—worked at the Library but supplied his own equipment. The contract for 1882 called for printing cards for 24 titles per day. In 1895, with the move to Copley Square, the Library established its own fully equipped printing plant, simultaneously providing "the first instance of the use of linotype by any library."

While changes were occurring in both content and form of the cards made for the Research Library Catalogue, the catalogue itself was moved and expanded several times during its first century. The changes associated with the move from Boylston Street to Copley Square have already been noted. Yet in the annual report for 1906, only eleven years after the move to the McKim Building, we read that the "entire catalogue has been shifted so that all the empty drawers which had been reserved for growth are now in use." The next move began on October 30, 1961, and occupied three days as cases were transported from the north end of Bates Hall to the Abbey Room, also the service area for stack requests. This beautiful room could not contain the burgeoning catalogue for long, however, and supplemental cases had to be placed along the Chavannes Gallery as well. The final move prior to the Title II-C project came in July 1975, when the Research Library Catalogue was shifted to what is now called the Bibliographic Center and the adjacent Elliott Room.

More Than a Catalogue

It soon became evident to project members that the Research Library Catalogue had functioned over the years as considerably more than a catalogue. Fortified by thousands of analytical entries, it had served for years as an index—to periodicals, collections, and anthologies—prior to the growth of commercial indexing services.

More than index, the catalogue served as teacher of science, history, philosophy; as definer and explainer; as directory and organization manual; as conveyer of the unexpected. Successions of information and reference cards testify to the many functions of the catalogue. Under Gasteropoda could be found 21 other headings including Opisthobranchiata and Pyramidellidae; under fuel were listed 16 sources of energy; and under Fugitive Slave Law there were references to other laws and the names of particular slaves as well. The entry for the Propeller Club of the United States contained the objectives of the club while the heading for Boston's Fire Department was the key to an extensive list of firefighting organizations and companies.

In all its variegations and eccentricities, forms and functions, the Research Library Catalogue at the start of the Title II-C project revealed itself as a remarkable tool, organism, and slice of history. Those recruited to prepare the catalogue for publication approached their task with both trepidation and respect for the century and a quarter of human effort that had preceded them.

Part II

The Research Library Catalogue Project

The goals of the Research Library Catalogue Project deserve repetition here. In words they were brief; in potential impact, far-reaching. Title II-C funds were sought for editing, photoduplicating, and distributing this historic catalogue. By translating its cards into microfiche, the project was dedicated to preserving millions of deteriorating bibliographic records and to expanding access to the research collections of the Boston Public Library. Promoting the ultimate goal of resource sharing demanded publication of the catalogue in an affordable and distributable format after appropriate editing and rehabilitation.

In addition to its main goals, the project was seen as a precursor which might offer some insight to other research libraries planning to integrate newer styles of cataloguing into existing bibliographic files. To call the Research Library Catalogue Project prototypical would be unrealistic. The catalogue has too many unique elements which reflect local practices mandating particular solutions to exemplify typical problems facing most other American libraries. It is more accurate to suggest that certain phases of the project may offer guidance for other research institutions planning catalogue revision or reconciliation.

It should be mentioned here that, subsequent to the submission of the Library's original Title II-C proposal, there were developments which resulted in alterations in the plan of operation, not, however, in the goals of the project. The closing of the Research Library Catalogue had been projected to coincide with the closing of the main card catalogue at the Library of Congress and national adoption of the second edition of the *Anglo-American Cataloguing Rules* (AACR 2). When these changes were postponed at the Library of Congress, additional time was gained for further systematic correction of the existing catalogue. Time was also gained for cataloguing a major gift to the Library, the personal collection of Professor James Buell Munn of Harvard University. His library numbered some 35,000 titles, including many first editions in the fields of literature and the social sciences.

Preliminaries

Emphasis at the beginning of the project was on consultation, staff recruitment and training, analysis of tasks, and subsequent creation of standards and procedures. In the initial stages particularly, yet also throughout the project, consultation was a key factor. A hundred years earlier the Library had sought the experience of the British Museum and the Bodleian Library in transforming the first folio catalogues. In 1979 the Library turned to the New York Public Library, already immersed in the rehabilitation of its own research library catalogue. In February of that year Boston Public Library representatives met with the New York Public Library officials responsible for Project RETRO, which targeted the editing of the retrospective catalogue for publication in book and microfilm format. The New York project was already in its second year at that time and operating on a scale somewhat comparable to Boston's. Although there were significant differences in the catalogues to be edited and in the aims of the two projects, much useful information was gathered on editing protocols and the options for photoduplication.

Not long after the trip to New York, an Advisory Committee was appointed to review plans for the project and provide expert assistance. This group consisted of the Head of Cataloguing and Processing in the Harvard College Library, the Associate Director for Technical Services in the Boston University Library, the Associate Director for Technical services —later Director—of the Wellesley College Library, and the Head of the Catalog Department in the Bran-

deis University Library. Their recommendations concerning the proposal for continued Title II-C funding, their advice on the handling of current cataloguing during the editorial period, and their ideas on other matters provided invaluable guidance. This Advisory Committee continued to meet during the life of the project, examining the legibility criteria and the editing standards, inspecting work areas, and offering suggestions and support to project staff.

Additional support came from other library professionals. Within the Boston Public Library itself meetings were held with five groups of librarians working in public and technical services. At these meetings the goals and dimensions of the project, as well as the minor inconveniences it might cause, were explained and discussed. Project administrators also briefed several professional groups in the Boston area on the project, including the library directors and members of the Cataloguing Committee of the Boston Library Consortium, a network of academic and research libraries to which the Boston Public Library belongs. The level of support that the Research Library Catalogue Project received during all its phases was gratifying and reflected, quite possibly, the anticipation of improved bibliographic services in the area. Indeed, the third major phase of the project—distribution—was intended to include the deposit of copies of the microfiche Research Library Catalogue in each Boston Library Consortium institution and in the chief libraries of the western and central regions of the Massachusetts public library network.

Personnel

At a time when many libraries are attempting retrospective conversion of bibliographic files to machine readable form, it is important to reiterate that such an approach to preservation and distribution was not deemed appropriate for the Research Library Catalogue. Even though a fair portion of its recent catalogue cards had been produced through the Library's automated system, the variety and style of earlier records would make the tagging of data elements very difficult, if not impossible without recataloguing. Full-fledged retroactive authority control was likewise thought to exceed the basic aims of the project. The editing and rehabilitation of the catalogue was thus dependent on the keen eyes and cumulating experiences of the project staff.

Because the nature of the project required great faith in the judgment and responsibility of the staff, it is not surprising that recruitment and training were such important elements in the early months of the project. All administrative and supervisory positions were held by regular Library employees assigned to the project for its duration. As the dimensions of the project were determined, the Library proceeded with recruitment. Needed in project workers was a broad range of subject knowledge and foreign language competencies. Another requisite, for some, was advanced typing skill. All told, more than 20 organizations and institutions were initially contacted for recruitment, 150 persons interviewed, and 46 selected. The process continued as vacancies arose in later months, mainly among the student library aides. The full-time staff, however, particularly in professional positions, remained remarkably stable. This continuity was an important factor in the success of the project.

First Tasks

An initial task in the project was the filing of a large backlog of some 400,000 cards. This task provided an effective vehicle for orienting staff members to the Research Library Catalogue and training them in the complexities of the Library of Congress filing rules. Filing of the backlog was completed at the rate of approximately 20,000 cards per week.

As part of this training/testing period, the staff undertook examination of the filing order and checking of all references under several voluminous headings such as Bach, Bible, Boston, Catholic Church, France, and Great Britain. Through this initial editing and subsequent close revision, it was hoped that each staff member would acquire sufficient competence and confidence to revise the filing of student aides at later stages of the project. Some of this preliminary editing was also useful in establishing standards and procedures that were compiled into the Editing Guide used for the remainder of the project.

During the early months of the project staff members proceeded with catalogue maintenance beyond the accelerated card filing. Certain housekeeping activities were handled such as measuring tray space, shifting cards to allow room for expansion, and relabeling trays. In the beginning two other tasks—pull-

ing multiple card records with missing parts and removing staples holding such records—were undertaken also, but it soon became apparent that such work would be more productive at later stages of the project.

Some of the first tasks, though routine, required the cooperation of many Library staff members. Supplies and equipment for the project, including seven new typewriters, had to be procured. Working space for about 50 people had to be found also. In addition to the Parker Room and the Elliott Room used at the outset, two existing departments within the Library's Resources and Processing Division ceded space to the project. These moves entailed the relocation of bibliographic files, office furniture, and electrical outlets, as well as personnel.

Supplemental Catalogue

A supplemental card catalogue was set up in an area adjacent to the main catalogue area to hold current cataloguing during the editorial phase of the project. The staff at Project RETRO in New York and the Advisory Committee had advised isolating—temporarily—recent records from the main file undergoing editing. These cards representing current cataloguing were to be refiled into the proper sequence following the editing phase of the project.

Legibility Criteria

Still another preliminary task, establishment of legibility criteria, required an extended period of work involving equipment in the Microtext Reading Room, a public area. Since more than 7,500,000 catalogue cards were destined to be photographed, the readability of data from the cards in their final fiche format was of prime importance. To this end, samples of microfiche were produced by filming a typically well-

used catalogue tray —in this case, the section of entries dealing with Chaucer. Staff then painstakingly examined the microfiche samples in comparison with the original cards and recorded their impressions of each frame. From the tally of these individual impressions an acceptable level of legibility emerged. Once established, these criteria of legibility were applied to current cataloguing products as well.

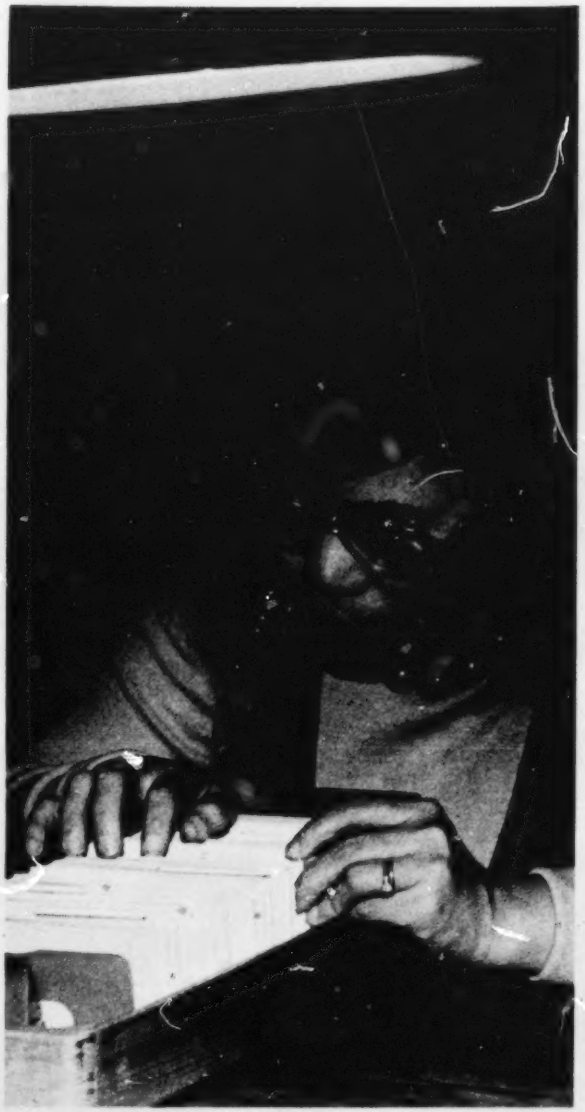
Guidelines

Important to cite here are the manuals created early in the project for specific guidance of staff. Both editorial and catalogue maintenance standards were agreed upon, codified, and—along with working procedures—developed into manuals for each team. In this way, not only was visual, in-print guidance proffered, but an insurance, as well, that uniform standards would be applied throughout the project.

The Editing Guide encompassed the tasks and problems of First and Second Pass Editing. In both the Editing and Catalogue Maintenance Manuals the legibility standards were of paramount importance. Actual cards from the Research Library Catalogue were pasted into the two manuals as indicators of unacceptable items or partially acceptable items, coupled with precise instructions for improving them.

Catalogue Rehab Begins in Earnest

With six months of preliminary work completed, the staff was ready to begin rehabilitating the catalogue in earnest. April 1 was chosen as the official starting date with some humor. Members of the project staff were ultimately divided into two main groups, Editorial and Maintenance, each supervised by a department head drawn from the Resources and Processing Division of the Library. But it was the Editorial Group that began concentrated work first, in the spring of 1979.



Editorial Group

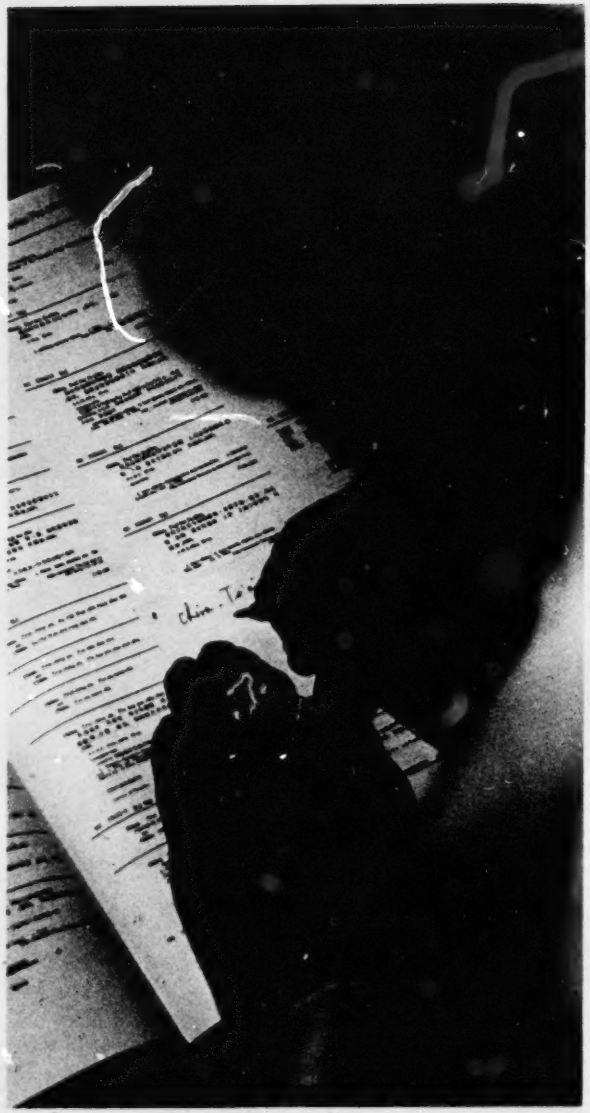
The Editorial Group was organized into eight teams, each consisting of one professional librarian, one library assistant, and from one to three student aides. Each team was charged with editing 831 of the 6,648 Research Library catalogue trays at the rate of approximately 50 trays per month. Team members kept a logbook for their sections so that progress in editing could be recorded on a weekly basis.

First Pass Editing

The editing was planned as a two-pass process. First pass editing was dedicated to detecting and correcting such mechanical errors in the catalogue as misfiling, illegibility, typographical errors in headings that would affect filing order, and duplicate, temporary, or incomplete cards. Much of the first pass editing was performed by student aides under close supervision. The standards and instructions spelled out in the Editing Guide and other tools provided firm guidelines for team members as they worked through the catalogue, card by card.

The authority for filing was the main text of *Filing Rules for the Dictionary Catalogs of the Library of Congress* (1956) and the alternative rules in the Appendix for corporate authors, forenames, and numerical and chronological arrangement. Illegibility was gauged by the criteria agreed upon in the preliminary phase of the project. Only the most essential elements on a card—the heading, main entry, title, and call number—were checked for legibility, and illegible headings in the middle of long runs or readable elsewhere on the card were left alone. Touching up indistinct elements with a fine point pen was the treatment of choice for added entry cards representing joint authors, titles, subjects, or additional approaches to a work. Added entries with broken corners or graffiti, however, were candidates for single card replacement and immediate refiling.

Illegibility on main entries was cause for greater concern, since the added entries—themselves photographed from the main card in most cases—were likely to reproduce even more poorly. In such cases, the full set was pulled for replacement by the Catalogue Maintenance Group. Duplicate, temporary, or incomplete cards were also removed for later attention from the same group. Cards with typographical errors in areas likely to affect filing were corrected and refiled by the Editorial Group. Errors found elsewhere were usually ignored. In general, practical rather than aesthetic solutions were sought for the problems encountered during the first pass editing.



Second Pass Editing

Editorial standards for the second pass likewise aimed at promoting greater consistency throughout the catalogue. The focus of this pass was on the access points leading researchers to a work, in keeping with the goal of providing a useful bibliographic tool for

readers in other libraries. Most second pass work was performed by library assistants and professional librarians. Among the problems dealt with were inconsistencies in the establishment of personal, corporate, and geographic names; disparities between the Boston Public Library scheme of subject headings and the Library of Congress system adopted in the 1930's; blind or missing cross references; faulty call numbers; and inaccurate or deficient guide cards and information cards. Besides dealing with these bibliographic faults, second pass editing was also dedicated to detecting and correcting any residual mechanical errors overlooked in the first pass made earlier by student workers. In addition, non-distinctive title runs, such as *Poems*, *Stories*, and *Essays*, were eliminated along with title added entry cards doubling with title main entries. It should also be noted that some trays containing long runs of either title added entries or subject headings required practically no second pass editing—to the delight of all.

While much of the second pass work required patient checking of name headings and references and incomplete call numbers, a great deal of it involved imaginative attempts to discover and bridge the gaps between the subject headings in what was referred to as the "old BPL system" and the Library of Congress scheme instituted in 1936. Major differences of both substance and style existed between the two sets of terms used in subject analysis. In many cases "see also" references had been made from BPL to LC headings by WPA workers, but substantial material was still listed under variant headings which usually were not filed adjacently. Thus material on a subject might be scattered. The mere addition of a plural "s" could result in the separation of BPL and LC headings by numerous intervening entries and even place them in separate trays. For example, under the old BPL system materials on the subject were assigned the heading "Horse"; in the LC system "Horses." Cards bearing headings like "Horse in mythology," "Horse stealing," "Horseflies," and "Horsemen in art" intervened.

On the whole, BPL forms of subject heading leaned in the direction of the formal, generic term whereas LC was geared to popular usage. Thus BPL subjects spoke of malacology, herpetology, jurisprudence, and pomology; LC opted for mollusks, snakes, law, and fruit. In some instances there was no equivalent concept between the two sets: "Shellshock" never had its match in the LC system while "Underdeveloped areas" did not exist and "Cloning" was not anticipated in the "old days" of the "old BPL system." It was relating partially equivalent concepts, however, that proved to be the most difficult task in the second pass work. For the BPL term "Indians of America" there were several groupings in LC such as "Indians of North America," "Indians of the West Indies," and similar headings. An important, not infrequent step in second pass editing was, therefore, consulting the list of *Library of Congress Subject Headings* and then the catalogue itself to determine where reconciliation was needed.

Many differences in subject headings and subheadings related to place or historic time subdivisions, or —in literature—involved genre headings or subheadings. Reconciliation of these inconsistencies was spelled out in the editing guidelines. Whenever possible, blanket references were used to relate material handled differently—but consistently—in the two subject heading systems. Some examples of this kind of blanket referencing are:

Newspapers—[PLACE] *see also* [PLACE]. Newspapers
Art—[PLACE]—Galleries and museums *see also* [PLACE]. Galleries, museums, etc.
Mythology, [ADJECTIVE] *see also* [PLACE]. Mythology

Faced with other disparities in subject headings, editing teams were guided to the most expeditious resolutions in their reconciliations. Such practical resolutions for the most part fell into one of three methods: headings similar in wording or spelling were left unchanged and interfiled, with appropriate notice; old BPL headings were changed to present Library of Congress form, and the change recorded on the main entry; old BPL headings were left unchanged and "see also" references made to link materials on similar topics.

Where the choice of solution was not immediately apparent, the Editing Guide provided assistance. Expediency—or what would involve the least amount of card work—usually dictated the choice among methods. Such considerations included the number of cards affected, the length of headings, the condition of cards, and the number of references required. Generally, only headings involving five or fewer cards were changed; longer runs were interfiled or linked with references. The project sought to prepare, before filming, a reasonably accurate and readable catalogue. Consistency and implementation of national standards were of secondary importance, sometimes even disregarded in favor of common sense.

Catalogue Maintenance Group

Supporting the Editorial Group was a Catalogue Maintenance Group consisting of up to seven library assistants and, at times, more than a score of students. The main task of the Catalogue Maintenance Group was to furnish replacements for seriously deficient card sets in the Research Library Catalogue. Starting in July of 1979, this work involved examining the illegible main entry cards or temporary slips pulled from the catalogue by the Editorial Group, determining the best method of replacement, ordering or creating new card sets, and refiling these replacements in the catalogue. Altogether, new card sets were produced for more than 43,000 titles. These sets included more than 82,000 individual cards. This work, of course, supplemented the thousands of single card replacements and corrections handled directly by the editing teams.

In its replacement work the Catalogue Maintenance Group was guided by instructions as detailed as those written for the Editorial Group. Main entry cards that appeared fairly complete were usually just retyped. Sufficient copies for added entries were then ordered from the General Microfilm Company. When these copies arrived, the titles, subjects, and other entries were typed as headings to provide additional access points. At least 31,663 unit cards and 94,935 copies of them were generated in this process.

Another 38,654 cards representing 5,489 titles were reproduced through the Library's own automated cataloguing system, geared to handling bibliographic records already encoded in or converted to machine readable form. In many cases it was necessary only to furnish a locally-assigned processing number to obtain new cards. At other times the library assistants searched the ROM title index to the MARC tapes issued by the Library of Congress in order to ascertain whether machine readable records were avail-

able. If so, they were culled from the Library's file of MARC tapes by Library of Congress card number. Fortunately, such computer-produced cards required no additional typing or keying.

From the Cataloguing Distribution Service of the Library of Congress an additional 2,014 card sets were ordered directly—mostly for works in such non-Roman script languages as Arabic, Hebrew, and Russian. On such cards, all heading or access points appear in transliterated form to permit interfiling with other languages. These transliterated headings had to be carefully typed onto the cards for added entries, with painstaking attention to diacritical marks.

Not all of the replacement work involved cards with reasonably full cataloguing however. Over 20,000 yellow and red temporary cataloguing slips and some rather sketchy records on card stock needed full sets made as well. Besides searching the previously mentioned ROM index to machine readable cataloguing, the Catalogue Maintenance Group also sought replacement copy in the *National Union Catalog*. If the record found had been created at the Library of Congress, a card set was ordered from its Cataloguing Distribution Service, by card number. Records created at other libraries were examined more closely and then reproduced or adapted as necessary. At all times recataloguing was viewed as a last resort.

Still another form of replacement occurred when the main entries in the 3200-tray Official Catalogue, long closed to the public, were compared with the main entries in the Research Library Catalogue. Trays from the former, which was stored in the basement of the General Library, were brought to the Parker Room for examination next to public catalogue trays. This card by card comparison by specially trained student library aides amounted to a third pass through the catalogue. Initial estimates that as many as 70,000 main entries filed in the Official Catalogue would be lacking in the Research Library Catalogue proved to be correct. Subsequent sampling showed, however, that the added entries for these titles were not missing in most cases. As a result, full card set replacement for the lost Official Catalogue titles was deemed unnecessary, and the main entries for these works were filed directly into the Research Library Catalogue.

Most other replacement copy could not be handled quite so easily. The new card sets—together with single card replacements, corrections, and cards for titles catalogued near the end of the editing—were kept in alphabetical order by at least first letter. When the Editorial Group finished its work at the end of March 1981, these unfiled cards numbered about 300,000. The temporary, supplemental card catalogue, begun two years earlier to hold current cataloguing, contained another 200,000 cards in strict alphabetical order. Before the Research Library Catalogue could be microfilmed, these half million cards would have to be filed into the main sequence. In order to accommodate such a large influx of new cards, however, it was necessary to expand the catalogue once more.

Thus, for the fifth time since 1871 the file that had begun as the Bates Hall Catalogue on Boylston Street was rearranged and greatly enlarged. This vast undertaking, which involved relocating catalogue cases from remote areas of the Library and handling almost 10,000 trays, was carried out with remarkable dispatch and very little disruption in public services. The actual shifting of 7,300 of Research Library Catalogue trays in the Bibliographic Center and the Elliott Room took about four days to plan and eight days to execute. About 4,400 of the trays shifted had to be renumbered, but relabeling their contents was deferred since the cards in them were to be moved during the interfiling process.

Much Learning, Some Laughter

Exposed as they were to more than 7,500,000 cards of the Research Library Catalogue, staff members learned much in the broad areas of civilization and literature, in cataloguing practices, and in specific editing protocols. But the project engendered a lighter side, as well. Before renewal of the grant for the second year, chuckles were shared when a staff member came upon the ominous title, *They'll cut off your project*. Someone else discovered the most euphonic title: *AO kiko, oia ke ao ana i ke kau ana i na kiko, a me ka hookomo ana i na hua nui ma ka olelo.* Other favorites were the most tongue-twisting title: *Barbs, prongs, points, prickers, & stickers; a complete and illustrated catalogue of antique barbed wire,* and the candidate for longest title: *One hundred reasons why every man who loves good government, human rights, economy, honesty, progress, freedom of speech, freedom of the press, liberty, equality, and fraternity should vote for the re-election of President Grant.*

Amusing titles were endless: such laughables as *The power of soap and water,* or *Say it with bricks. A few remarks about husbands,* or *Wife beating as a crime and its relation to taxation,* or *Faust and loose.* The most unusual or hilarious specimens were photocopied and affixed to the walls of the Parker Room for sharing. More than a few cartoons appeared there as well as a highly unofficial chronology of the project.

Subject headings and see also references frequently drew laughter from project members:

Insects—Cookery

Baboons—Congresses

Celebrities. *See also* Eccentrics.

Dephlogisticated air. *See* Oxygen.

Automobile houses. *See* Garages.

Infidelity. *See also* Agnosticism.

Staff discovered other "visible risibles" on the catalogue cards, often derived from surprising relationships between authors' names and the titles of their books, for example:

Nuclear reactor kinetics, by Milton Ash.

The crockpot cookbook, by Barbara Bean.

The crime problem, by Walter Reckless.

Judo, by John Goodbody.

A primer of evolution, by Edward Clodd.

The appetites of man, by Sally Devore.

What the catalogue failed to supply, the staff manufactured on its own:

Margaret of Anjou, Consort of Henry VI, King of England, 1430–1482.

see also

MARGE & HARRY'S DINER IN OLDE LONDON (SOUTHWARK DISTRICT)—BREAKFAST SPECIALS AND EDICTS-TO-GO

Nikon, patriarch, 1605–1681.

see also

CAMERAS AND PHOTOGRAPHY—HISTORY—RENAISSANCE PERIOD.

French spoliations.

see also

PATE DE FOIE GRAS, BOTULISM IN.

Throughout the project the progress toward goals resulted in celebratory gatherings. First came the 400,000th card luncheon at a local restaurant. A sundae party was held to confirm the halfway mark in the Official Catalogue comparison. Other special events

included the Great Leap Forward celebration in March of 1980 to mark a particularly productive month and the end-of-editing festivity a year later. Beyond a doubt, glasses again will clink and cheers erupt when the catalogue on fiche is delivered.

Final Tasks

While the staff of the project was preparing the Research Library Catalogue for closing and freezing on fiche, others in the Library were working toward the same end. The Title II/NUC Searching unit and the Original Cataloguing Department were trying to process as many older titles as possible, including the previously mentioned Munn Collection. Works catalogued according to the first edition of the *Anglo-American Cataloguing Rules* will continue to be entered in the card catalogue until the onset of filming. During this period, also, the Production unit attempted to resolve miscellaneous card problems that had accumulated and contemplated checking the duplicate cards pulled from the Research Library Catalogue by the project staff. The Serials unit, too, worked on clarifying records for some of the titles represented in the catalogue. In these and other ways the efforts of many not assigned to the project also contributed to its success.

Evaluation

It is too soon for project administrators to evaluate the total Title II-C project. But certain areas of "what we learned" from the Research Library Catalogue operation emerge loud and clear. We learned the importance of planning—not only the broad planning involving phases in the move toward goals, but the kind of planning which includes measurement, sampling, testing, dry runs. This planning demands commitment of time and staff before the actual operation commences. We also recognized at the outset—and the Advisory Committee concurred—that we must operate within the parameters of practicality; it was not feasible to redo the entire catalogue.

Other elements which were demonstrably essential in the project included determination and agreement on standards; staff training and the role of printed guidelines in reinforcing knowledge of the tasks being performed; consultation with experts; briefing of non-involved staff since such a project has ultimate impact on all staff—and patrons.

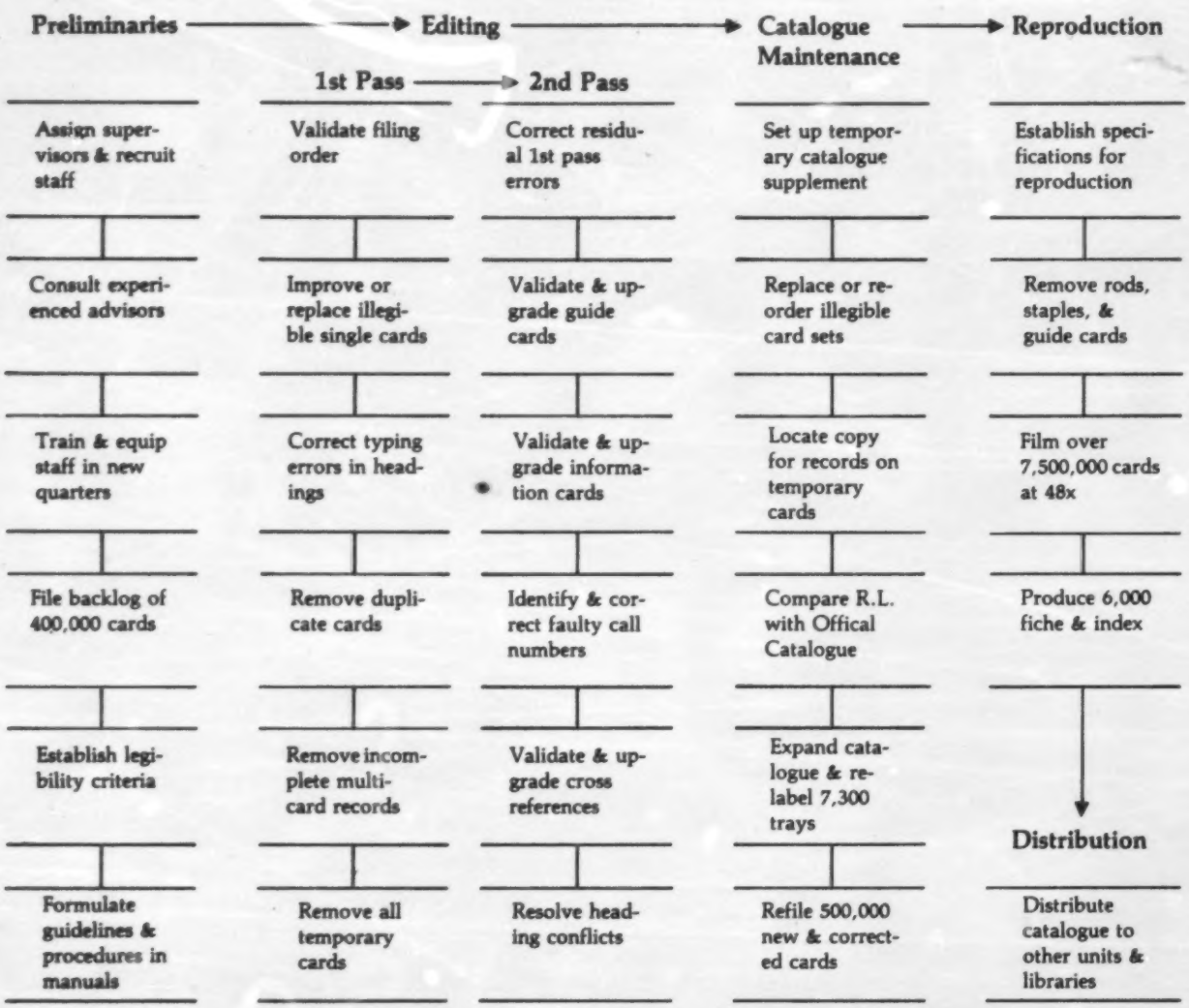
Now and Next

Phase one—editing—of the Research Library Catalogue project has been completed, but phases two and three are just beginning: actual photoduplication and distribution of the catalogue lie ahead. Contracts will soon be mailed out to prospective vendors requesting bids for the microfilming project. Specifications for the photoduplication process call for microfilming at a 48× reproduction ratio. This will result in a set of approximately 6,000 microfiche, each fiche containing 1,200 cards. The top row of each fiche will be reserved for title information and fiche number. Each card within a fiche will have its own row-column index number.

It is anticipated that the catalogue will be reproduced both in sets of cut individual fiche and also in 105 mm 400 foot roll format for use in manual, motorized, or automated roll film reading devices. A separate hard copy printed index to the fiche catalog will be printed (from a computerized file) for ready reference to the fiche catalogue.

We expect that at some point in the future this machine readable index will be coupled with the roll fiche to create a fully automated access system. The coupling of the photographic technology with computer technology is still in a developmental stage. A

RESEARCH LIBRARY CATALOGUE PROJECT / MAJOR PHASES


Preliminaries
Editing
1st Pass
2nd Pass
Catalogue Maintenance
Reproduction
Assign supervisors & recruit staff
Consult experienced advisors
Train & equip staff in new quarters
File backlog of 400,000 cards
Establish legibility criteria
Formulate guidelines & procedures in manuals
Validate filing order
Improve or replace illegible single cards
Correct typing errors in headings
Remove duplicate cards
Remove incomplete multi-card records
Remove all temporary cards
Correct residual 1st pass errors
Validate & upgrade guide cards
Validate & upgrade information cards
Identify & correct faulty call numbers
Validate & upgrade cross references
Resolve heading conflicts
Set up temporary catalogue supplement
Replace or reorder illegible card sets
Locate copy for records on temporary cards
Compare R.L. with Offical Catalogue
Expand catalogue & relabel 7,300 trays
Refile 500,000 new & corrected cards
Establish specifications for reproduction
Remove rods, staples, & guide cards
Film over 7,500,000 cards at 48x
Produce 6,000 fiche & index
Distribution
Distribute catalogue to other units & libraries

prototype system has been developed, but it will be some years before this kind of system can be implemented in a heavy public use environment. It is our hope that adequate provision is being made in the specifications to insure adaptability to more sophisticated retrieval systems as they are developed.

The Research Library Catalogue that succeeds the card catalogue will reflect national, rather than local, cataloguing standards, and most of its records will be processed through the Library's automated bibliographic system. The Library plans to make this data available through either one of two media: an on-line terminal or off-line through computer output microfilm, in a format that is compatible with the retrospective fiche catalogue.

What began in the gracefully handwritten folio entries of 1852 will be carried forward by the mechanisms of the 20th-century computer. Seven and a half million as a number is almost too large to comprehend. But the project staff faced the figure card by card, problem by problem, tray by tray. In their work to bring the card catalogue to an honorable end they assisted in the transition from folio to fiche and the advent of a fifth form of the Research Library Catalogue.

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